tailoredPOS Gift Card Solution

for Dinerware® POS

Version 2.0

User Manual

tailoredPOS

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MANUAL BACK-UP

1) Log into Dinerware using your personal pin code or manager card;
2) Click on **Manager**;
3) Click on **Gift Cards**;
4) Click on **Backup Cards**;
5) A "browse folder" dialog box will appear;
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_____ _____

Signature Date

_____

Print Name

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Installation and Setup

Prerequisites

1) The lastest release of Dinerware 3.x
2) The gift card setup msi. (You should be provided with a download link when you receive your license file from tailoredPOS)

Before You Begin

Please make sure that you have properly setup and configured Dinerware/Dinerware Basics before you begin. It is strongly recommended to make a backup of the working database, and to deploy the provider during closed hours for the restaurant. Failure to follow any of these warnings may result in a corrupt database, and difficulties in supporting the product for the end-user.

You will want to exit Dinerware Brain and Dinerware Workstation on all machines in your establishment before you begin. Failure to do so may result in configuration issues.

Installation

This document is based on setup of Dinerware 3.0.3 on a Windows Vista machine. All references to configuration options may need to be altered to match your version of Dinerware or Operating System.

Begin setup by double-clicking the msi file and answering yes to begin installation. After reading and accepting the EULA, you will be prompted to choose an installation folder. If you are installing in Dinerware 3.0, you may keep the defaults. Any other version of Dinerware "3", you must select the correct folder where Dinerware is installed on your machine. Once the installation folder is selected, you will simply click through the screens and allow the msi to install the software on your machine. If you are installing on a machine with User Access Control enabled, you will need to confirm installation when prompted.

Dinerware Configuration

Begin by launching Dinerware Brain. When you have the main Brain screen come up, click on the "Configure Payments" option, and enter the administrative user pin (typically '0000') and the password you have set for the pin. Look at the "Gift Card Processor" section of the "Select and Configure Payment Processors" window, and select "Integrated GC Module", then click "Configure Processor".

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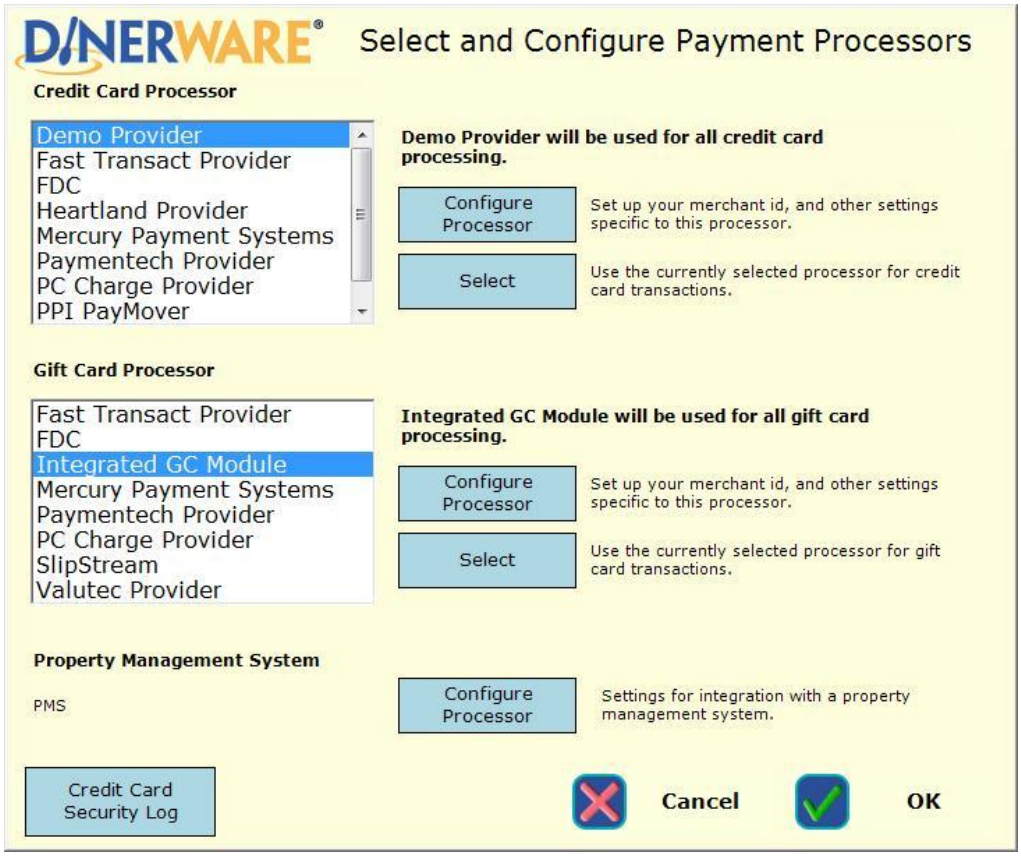

In the Configuration window, you will do 2 things… install the license, and select whether you wish to have cards preloaded into the system or not. It is strongly recommended you enforce loading gift card numbers into the system, for security reasons.

Once you are completed with installation of the license, you may click the “Select” button on the “Select and Configure Payment Processors” window for the “Gift Card Processor” section, and then click “Ok”.

The rest of the configuration of Dinerware for processing gift cards is no different from setup for Mercury, Valutec, Givex, Mercury, etc. You can access those instructions from http://portal.dinerware.com/ and search for “Gift Card Setup for Dinerware”.

Backups

NOTE: DUE TO THE NATURE OF THE INFORMATION STORED WITH THIS APPLICATION, BACKUPS ARE AN ESSENTIAL PART OF A SUCCESSFUL DEPLOYMENT. PLEASE MAKE SURE YOU CONSULT WITH ONE OF OUR SUPPORT TECHNICIANS, OR WITH YOUR RESELLER ABOUT PROPER BACKUP PROCEDURES.

Manual Backup Procedures

To create a manual backup to USB thumb drive or other portable media, after you have log into Dinerware using your personal PIN or manager card:

Press the Manager Button on the Upper right-hand side of the screen

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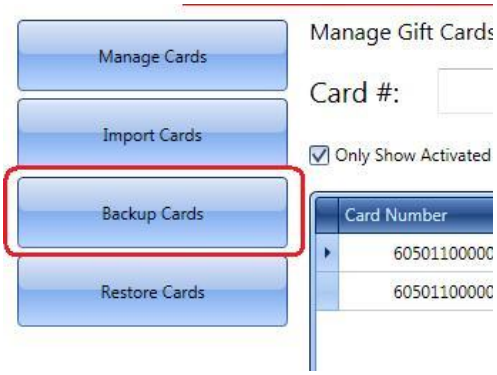
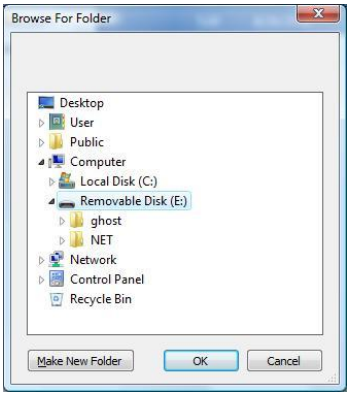
Press the 'Gift Cards' button in the Manager screen.

Press the 'Backup Cards' button on the left-hand side of the screen.



In the dialog box that appears, select your backup destination and press OK.



The backup is now complete. You may remove the portable media and take it offsite to your secure location.

Automatic Backup Procedures

Although you should not rely solely on this feature, and we recommend using the manual backup procedure above as your primary backup of the gift card data, we have built an automatic backup procedure that runs at 4:01 AM daily. In this procedure, the backup file is exported to either of the two folders, dependent on your operating system:

For Windows XP Users:

c:\Documents and Settings\All Users\Application Data\tailoredPOS\tailoredPOS Gift Cards\

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For Windows Vista and Windows 7 users:
C:\ProgramData\tailoredPOS\Dinerware Gift Cards\.

Consider any folders and files inside of the above mentioned folder to be an important file that should be backed up. You may either use a daily batch file that moves the data inside of the above folder offsite, or you can subscribe to one of the many offsite backup service providers, such as iBackup, Carbonite, etc. and follow their directions on proper setup and usage of their backup services.

Importing Gift Cards

Supported Encodings

The general rule of thumb with regard to the encoding of a magnetic card stripe is that if the card can be used with your existing card processor, and you are converting over to our in-house solution, you are capable in using your existing cards with our solution. The DW Payments Engine 2.9 handles parsing the magnetic stripe before we begin processing the gift card.

If you wish to find out if a particular card is capable of being processed, our gift card solution is built to run a maximum of five (5) cards without the need of a license. This should allow you to evaluate the solution in full detail before you make any decision.

To go further into detail on the different supported encodings of the system, Dinerware has provided several existing card formats that have been successfully used in the past. All data here is direct from the cards, without any special formatting:

Existing Processor	Card Data
Mercury Payment Systems	;77359800380=550110128?
Paymentech	%B6035710120930000093^^49120009500?
Givex (older standard)	;1769324919?
Givex (recent standard)	;60362841172205696299?
Valulink	%B6010567006474780^FIRSTDATA/PREPAID/TEST^00010004000070778544 ? ;6010567006474780=00010004000070778544?

In further discussions, we consulted with Dinerware to better understand their practices and procedures in reference to handling the parsing of track data:

> We assume the 'card number' as a human would think of it is the first uninterrupted set of digits in the magnetic stripe data. We do not even care [sans Valulink cards] if you use Track 1 or Track 2.
>
> The Valulink gift card's facing number is 7777-0064-7478-8544 in the above example. This value can be derived from the track data if Valulink cards are being used, and you are converting from Valulink-based services.

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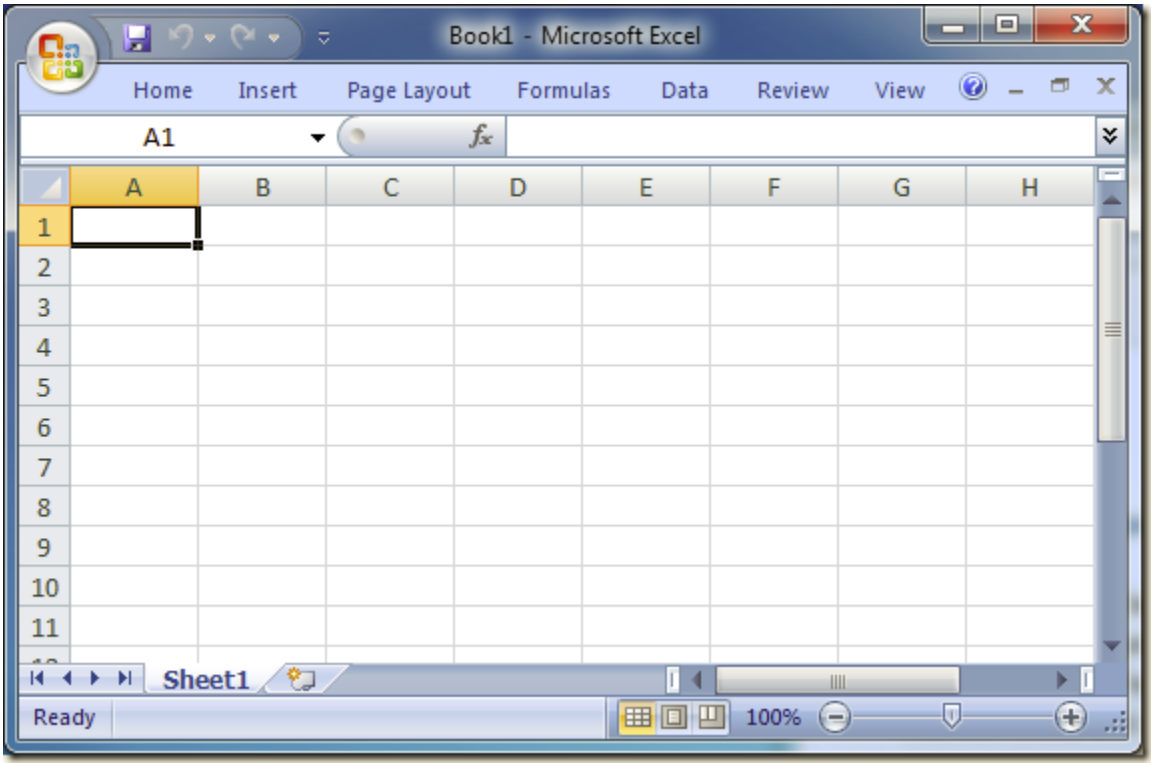
Note: Dinerware cannot support multiple card formats. Dinerware can either use the standard formatting (such as those from Mercury Payment Systems, Paymentech, Givex, etc.) or the Valulink format.

How to Import

Importing gift cards is a rather easy process once you have done it once or twice. The high level of it is to create a csv file containing the card number, the current value, and to state if the card is currently active in the system. If you are transferring from another gift card provider and do not know how to gain access to your current values, please contact our service department for further information.

Create the CSV File

To create the csv file for import, start with a blank Excel workbook. (If you do not have Excel, you can use a similar spreadsheet program and translate these instructions to that program.) You will remove any excessive worksheets inside of the workbook, and be left with Sheet1, as in the example below:



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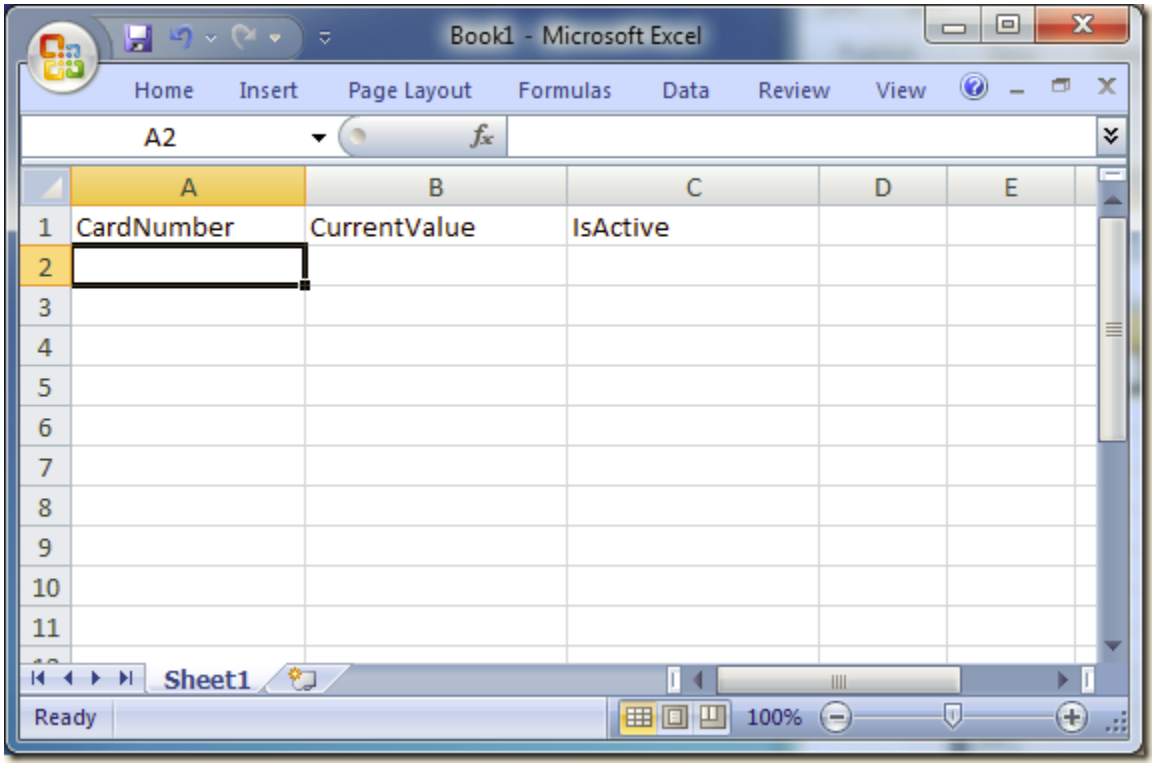
Next, using Row 1, add “CardNumber” into Column A, “CurrentValue” into Column B, and “IsActive” into Column C. Pay attention to the capitalization of each entry. The screen should look like this:



Starting in Column A2, enter the starting card number. Navigate to A3 by pressing the down arrow, if you are not on A3 already. We will enter a simple formula to create the remaining card numbers in the range. In Cell A3, enter the formula ‘=A2+1’ and hit “Enter”. You should have a number in cell A3 that is one more than Cell A2.

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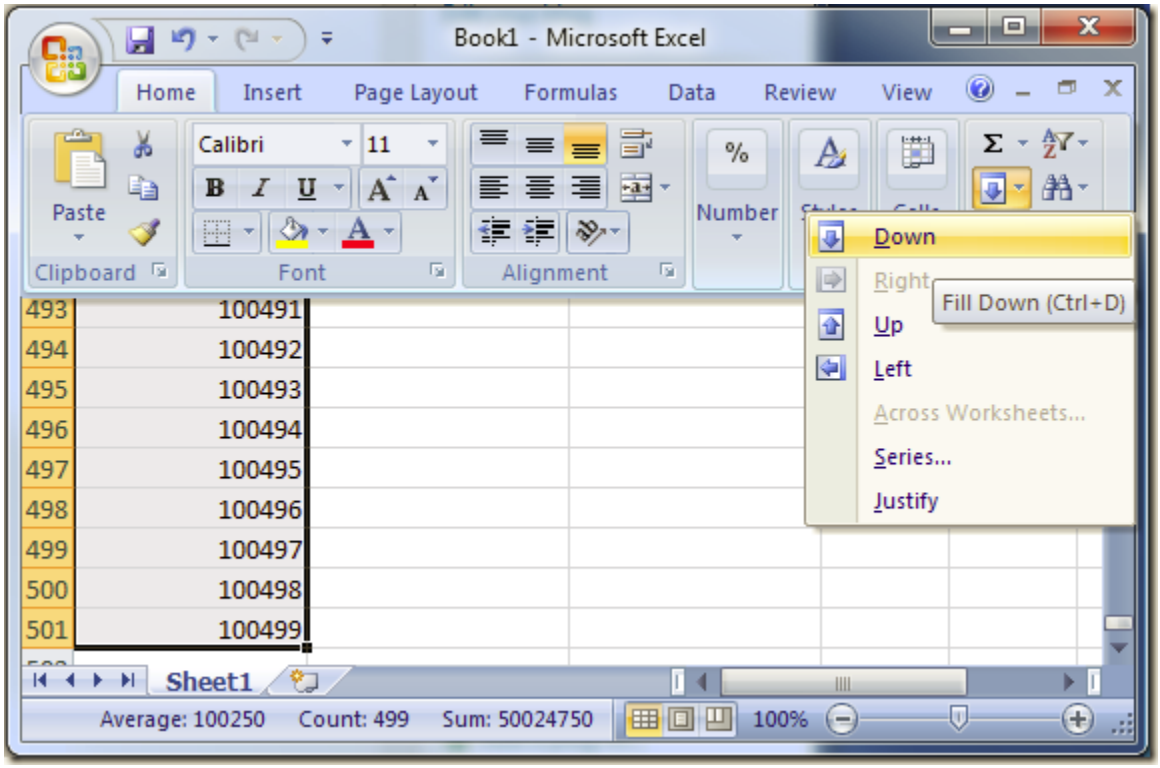
Next, Navigate back to Cell A3. Holding the shift key and using the page down key on your keyboard, navigate to the row number that equates the number of cards you have, +1. For our example, we have purchased a lot of 500 cards, so we will go to row 501 in Excel. Once there, on the home tab, look for the fill icon (shown in the following example) and click the "Down" menu item, or press Ctrl + D. Your screen should now look like this:



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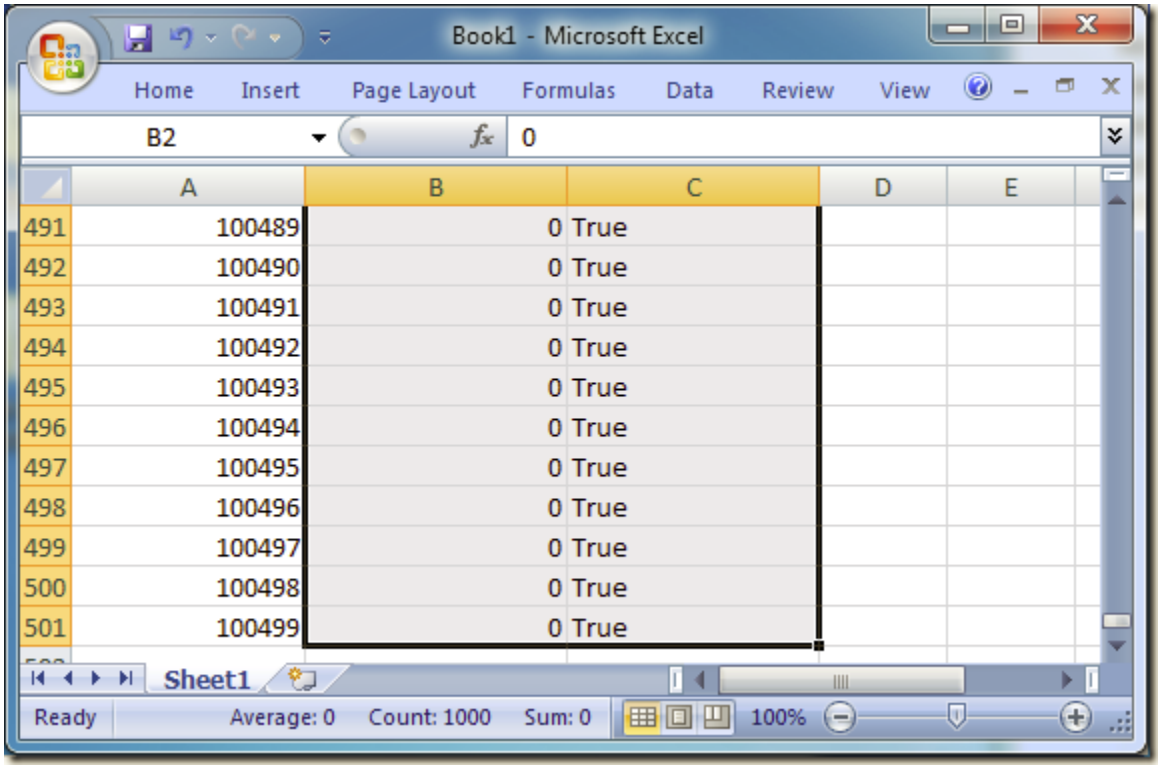
Scroll back to Row #2, and enter '0' into cell B2. Enter Cell C2 and and enter the value 'True'. You will need to change the cell format type for Cell C2 to be **Text**. Once that is completed, select Cells B2 and C2 and then while holding the shift key on the keyboard, page down to the end of the card numbers (in our case, row 501), and again, either press Ctrl + D, or use the fill option off of the ribbon and click the Down menu option. Your screen should now look like this example:



Note: If you are importing from another system, and the cards have an expiration date, you will want to keep the expiration date(s) in the original CSV file, and title that column as "ExpirationDate".

The final step is to do a File – Save As (You can use the Office Button and Choose Save As – Other Formats). Choose "CSV" as your file type, and save the file.

Import into the Provider

The task of importing gift cards can be performed at any workstation, with just a few touches on the screen.

Assuming you have already logged into any Dinerware workstation, entered Manager, and have pressed the "Gift Cards" button, you should next press the "Import Cards" button on the left-hand side of the screen. You are presented with a similar interface as your main management screen, but this is specifically to handle the importing of cards into the system.

You will next click on the "From File" button, and navigate into the folder or usb thumb drive where you saved the CSV that you created earlier and open the file. If all works as expected, your screen will have

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a listing of the new card numbers you wish to import. Should this error out, open the CSV file in notepad and verify the format of the columns, the capitalization, etc.

Once you have validated the imported data on the screen, go ahead and click the "Commit Import" button on the screen to complete the importing of the cards into the system.

Managing Gift Cards

The gift card system was designed to have cards preloaded into the system, and all instructions that follow are based on having those cards preloaded in the system before you begin activating and redeeming them. The system does have the option to not validate a card number as being preloaded, however we highly recommend against using that feature, and as such, do not provide instructions on how to operate in that mode.

We assume that for the following instructions, you have logged into a Dinerware workstation, entered into Manager, and clicked on the "Gift Cards" button at the bottom, right of your screen.

Activate / Add Value to a Card

Activating and Adding Value to a gift card is the same process, and is grouped within the same "Activate/Add Value" button on the screen. In order to either reactivate or add value to a particular card, you will want to look through the list of available cards, highlight the row that corresponds with the card you wish to reactivate, and click on the "Activate/Add Value" button at the bottom of your screen.

If you do not wish to add any additional value to the card, simply press OK in the window that appears, and you will have the card reactivated. If you wish to add additional value to the card, you may either enter it in the "Amount to Add" text Box, or click on the ellipsis button next to the text box, and punch in the new value you wish to add to the card, and then press "OK".

Change a Card's Expiration Date

To change the expiration date of a card, find the card in the list of active cards and touch it once to highlight it. After it is highlighted, press the "Change Expiration" button on the bottom of the screen. A new window will appear.

If you wish to remove the expiration date, simply uncheck the "This Card Expires" checkbox and click "Ok".

To change the expiration date after the window appears, simply scroll to the new date, highlight it in the calendar, and then press ok.

Deactivate a Card

To de-activate a card, look for the card in the list, highlight it, and press the "De-Activate Card" button in the main screen.

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